

4.2 ID by ITEM/ID by ITEM-CP

Introduction

The ID by Item screen allows you to:

- View and edit item data for an ID for the base stat period(s)
- Set bypass flags for an ID
- Change display features in the data table (i.e. font, colors)
- Choose 2 stat periods of data to review and edit within the screen and compare data in tabular form
- View current-to-prior period ratios of data item values
- Run the edit for a single ID
- Derive data for a single ID
- Weight data for a single ID
- Adjust data for a single ID
- Run simple imputation for a single ID
- Access the Notes screen for an ID
- Access the Respondent Text screen for an ID (if applicable for the survey)

NOTE: Weighted-adjusted data is not displayed on this screen. You can view weighted-adjusted data in the Review and Correction system from the ID Matrix, Roster Item Matrix, Item by ID, or Historical Data screens.

The ID by Item - CP (current/prior) screen allows you to:

- View and edit item data for an ID for the current stat period and specified prior stat periods
- Set edit and imputation bypass flags for an ID
- Run the edit for a single ID
- Derive data for a single ID
- Weight data for a single ID
- Run simple imputation for a single ID
- Access the Notes screen for an ID
- Access the Respondent Text screen for an ID (if applicable for the survey)
- View current-to-prior period ratios of data items

NOTE: Adjusted and weighted-adjusted data are not displayed on this screen. You can view adjusted and weighted-adjusted data in the Review and Correction system from the ID Matrix, Roster Item Matrix (if applicable), Item by ID, or Historical Data screens.

To understand how the current/prior (CP) matrix works, assume an annual survey with the item SALES. In 2003, the survey asks for current year (2003) sales and previous year (2002) sales. In the 2002, the survey asked for current year (2002) and prior year sales. The CP matrix will display three values for SALES – the current year sales reported in 2003, the 2002 sales as reported in 2003, and the 2002 sales as reported in 2002. This allows you to quickly determine if the current survey's value for 2002 sales is consistent with the value for 2002 sales collected in the prior survey.

Accessing the ID by Item Screen

- Click on the REVIEW AND CORRECTION button from the StEPS Main Menu.
- Select the “Review and Correction via selection set” option.
- From the Review and Correction main menu, choose a selection set to process. (See Chapter 4.1 for more information on accessing and creating selection sets.)
- Select the GOTO pmenu option.
- Select “Item Data”.

- Select “ID by Item”.

The screen shown as Figure 4.2 appears.

Item Name	N	R	I	1998A1 Reported	1998A1 Edited	A	D	i	1998A1 Adjusted	1997A1 Reported
EIYN				1		1	R		.	2
PFROM			
PTSA				1,258	1,258		R		.	1,000
CSAL				40,000	40,000		R		.	35,000
CTSA				1,500	1,500		R		.	1,258
CMON				100	100		R		.	50
MOIM			
TAXY				12	12		R		.	12
CADM			
CPUR				15,000	15,000		R		.	13,050
CPUS				.	38		D		.	.
SALP				.	14		D		.	.
PURP				.	15		D		.	.
CFRO				.	.		A		.	.
CTO				.	.		A		.	.
MOSP				.	100		D		.	.
CSLM				.	39,900		D		.	.
CCOG			
CMOI			

Figure 4.2 ID by Item Screen

Screen Features

4.2.1 HEADER SECTION

The ID by Item screen consists of 2 sections: a Header section and an Item Data section. The Header section has three parts: main header, display options, and the detail for the working ID. This section contains control information for the specified ID, including name, check-in date, and other processing information. The Item Data section contains item data for the working ID. The item data refers to numeric data collected on the survey form/instrument.

Listed below are field names and corresponding descriptions of information contained in both the Header section and Item Data section.

4.2.1a MAIN HEADER

The main header contains information from the Master (DATALIB.CONTROL) and Stat Period (DATA##.C1yyyypp) control files. The following is displayed in the main header section of the ID by Item screen for information purposes:

Screen name	ID x Item
Disclosure statement	Disclosure Prohibited - U.S.C. Titles 13 and 26
Date	Displays the current date and time
Survey	Displays the survey in review. To change the survey, you must access the Survey Selection screen. Click on the survey field to display the survey name. (See Chapter 4.1 for more information regarding survey selection.)
Stat Period	Displays the stat period currently being processed. This field is correctable. (See Chapter 4.1 for more information regarding stat period selection.)
SELSET	Displays the filename of the selection set currently being processed. Click on the SELSET field to display a description of the selection set. (See Chapter 4.1 for more information regarding selection sets.)
Cached ID(s)	Displays a listing of ID's accessed while in the screen.

Selecting a Stat Period

The default base statistical period is displayed in the first stat period field. The ID by Item screen allows you to select up to 2 additional stat periods of data to review on the actual screen. To specify a base stat period as well as additional stat periods:

1. Click on the arrow in the stat period field to display a pick list of available stat periods:

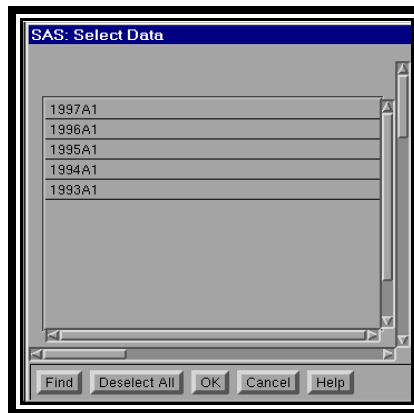


Figure 4.2.1a Stat Period Selection Screen

2. Click on the stat period(s) you want to select. To specify more than 1 stat period, hold down the CTRL key while you click each period.
3. Click on 'OK' to populate the screen with data for the corresponding stat period(s).
4. Click on 'CANCEL' to return to the ID by Item screen.

The stat period(s) selected from the pick list will be displayed on the screen in descending order, regardless of the order in which they were chosen. Stat periods selected within this screen will become the default for the Review and Correction module with the exception of the ID Matrix and Roster Item Matrix screens. These screens can only view data for the referenced base stat period.

You can also specify other stat periods to view, in addition to the base stat period, by choosing the "Change surveys" option from the UTILITIES pmenu from the Review and Correction main menu screen.

Accessing a Specific ID

- The ID box displays the ID associated with the item data on the screen.
- You can access a specific ID in the selection set by:
 1. Keying an ID in the ID field and pressing <ENTER>.
 2. Clicking on the picklist arrow (▶) in the ID field to bring up a list of all IDs in the selection set.
 - The default view option for the screen displays all 'unprocessed IDs' in the selection set. Select the 'All IDs' button to display both processed and unprocessed IDs. The process flag (PRCFLG) column will display a 'Y' if the ID has already been viewed, otherwise, 'N'.
 - Select an ID to process by clicking on the ID.

- Perform searches to find a particular ID by using the FIND TEXT option. This option allows you to locate a case by either entering the ID, the company name or a substring of the two. Entering a substring (partial) of the ID or the name will display all those IDs that share the same characteristics. Enter the company name or the ID in the 'Finding Text' field and click on the 'FIND (F2)' button. The list will display, beginning with the 1st occurrence of the ID matching the ID, company name or string entered.

Setting the Default Flag

This feature allows you to specify a single data flag to be applied to all item updates.

- Click on the picklist option to display a list of data flags:

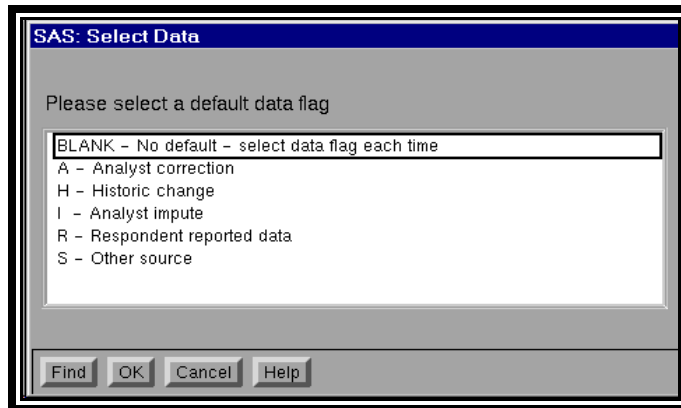


Figure 4.2.1b Default Data Flag Selection Screen

1. Select a default data flag.
2. Click on "OK" to populate the default flag field.
3. Click "CANCEL" to abort and revert back to the ID by Item (New) screen.

- If the default flag is set to 'blank', the data flag field in the data table is 'blank', and you do not press <ENTER> after changing a data value, the data flag field will be populated with an 'A' for 'analyst correction' after corrections have been applied.

On the other hand, if the default flag is set to 'blank' and the data flag field is populated with an existing data flag, the data flag pop-up window (Figure 4.2.1b) will display each time after pressing <ENTER> following a data change.

- If the default flag is set to a flag other than 'blank', the data flag field in the data table is 'blank', and you do not press <ENTER> after changing a data value, the data flag field will

be populated with the flag specified in the default flag field after corrections have been applied (F2).

On the other hand, if a default flag is set to a flag other than 'blank' and the data flag field in the data table is already populated with a data flag and you do not press <ENTER> after changing a data value, the data flag field will NOT automatically be populated with the flag specified in the default flag field. You must press <ENTER> after making a data change to populate the data flag field in the data table with the default data flag.

Goto Item

- Enter an item code in the 'Goto' item field for which you would like to view in the data table. The cursor will be positioned on the item at the top of the data table after pressing <ENTER>. **Note:** This option is useful for those surveys with items that extend beyond the initial screen.
- Click on the picklist symbol to the LEFT of the GOTO item field to select from a list of items located in the item file (ITyyyypp).
- Click on the symbol to the RIGHT of the GOTO item field to view or select from a cached list of item codes previously selected.

4.2.1bDISPLAY OPTIONS

The display option box includes several features that allow you to view different versions of data within the screen. Display Options include columns to view, rows to view, run edit when access ID, save when exit, and the options button. Each option is explained in detail below.

Columns to view

The 'columns to view' option allows you to specify parameters indicating what data type(s) to be displayed on the screen. Select from one of the available options:

All Available Columns	Displays the reported, edited, and adjusted data for both the current and prior stat period(s) selected, current period edited data minus prior period edited data, and the current-to-prior period ratio.
All	Displays the reported and edited data for the current period, edited data for the prior period(s) selected, and the current-to-prior period ratio.
All - No Ratio	This is the default for the screen. Displays the same information as the "All" option excluding the current-to-prior period ratio.

All - Edited + Ratio	Only displays the edited data for the current and prior period(s) selected and the current-to-prior period ratio.
All - Edited	Displays the same information as the “All - Edited + Ratio” option, excluding the current-to-prior period ratio.
Current & Prior - All	Displays the reported and edited data for the current period, edited data for the prior period selected, and current-to-prior period ratio.
Current & Prior - Edited + Ratio	Only displays the edited data for the current and the prior period selected and the current-to-prior period ratio.
Current & Prior - Edited	Displays the same information as the “Current & Prior - Edited + Ratio” option, excluding the current-to-prior period ratio.
Current - All	Displays the reported and edited data only for the current period.
Current - Edited	Displays the edited data only for the current period.
Current + Edit flags	Displays the reported, edited, and adjusted data for the current period and the edit flags E1, E2, E3, and E4 (if applicable).
Current + All Reported	Displays the reported, edited, and adjusted data for the current period and the reported data for the prior period(s) selected.
All Reported	Only displays the reported data for the current and prior period(s) selected.
Current + All Comparable	This option is displayed only if your survey has comparable data. Displays the reported, edited, and adjusted data for the current period and the reported, edited, and adjusted comparable data values for the current and prior period(s) selected.
All Comparable	This option is displayed only if your survey has comparable data. Only displays the reported, edited, and adjusted comparable data values for the current and prior period(s) selected.

NOTE: The number of stat periods displayed in the data table will depend on the number of stat periods selected to view on the screen.

Rows to view

This option allows you to view different versions of the data in the data table. Select from one of the data version options:

Rows to view	Description
All	Includes reported, derived, and other source items.
All - Key Items Failed Edit	Displays only those items with edit failures. This option will only be displayed when a single ID edit is run and edit failures exist for an ID, otherwise, option not available.
****Items by Data Source**** <i>(These options are based upon the ISOURCE field defined in the Item Data Dictionary.)</i>	
Form Items	Displays only 'reported' items within the item file (DATAxx.ITyyyypp) with an 'F' in the ISOURCE field.
Derived Items	Displays only 'derived' items within the item file (DATAxx.ITyyyypp) with a 'D' in the ISOURCE field.
Items from other sources	Displays only 'other source' items within the item file (DATAxx.ITyyyypp) with a 'S' in the ISOURCE field.
****Complex Conditions****	
Using STEPS standard where clause	Selecting this option displays the standard where clause screen. You can choose a number of variables to view in the data table rather than processing all information for the ID. (See Section 4.1.2, Option 3 on creating a simple selection set using a "where clause").
****Items in Group 1 (Please pick one below)****	
Group 1 = “ ”	This option is based upon the GROUP1 field defined in the Item Data Dictionary. If no group field is specified, this option will not be available.
****Items in Group 2 (Please pick one below)****	
Group 2 = “ ”	This option is based upon the GROUP2 field defined in the Item Data Dictionary. If no group field is specified, this option will not be available.

NOTE: If you select an option other than 'All' from the "Rows to view" option, **SUBSET ITEMS = #** will be displayed just below the 'ITEMS = #' message in the working ID section. This message indicates that the information displayed in the data table is a subset of the total number of items in the item file. The message will be removed when 'All' has been re-selected.

Run Edit when Access ID

This option allows you to automatically run edits on the next ID that is accessed. Click on the button to activate this option. The check box will be blackened. You can turn the option off by clicking on the field again.

OPTIONS button

The 'Options' button allows you to modify the display of the screen within the data table.

- **Display Row#**

The 'Display Row#' option allows you to display or not display the row numbers to the left of the data table. Click on the 'Display row#' button to display the row numbers in the data table. Click on the 'Do not display row#' option to remove the row numbers.

- **Label to Left**

The 'Label to Left' option allows you to view the item label column to the left of the data table. To change the label position:

1. Click on the 'Label to Left' option to display the item label to the left and the item name column to the right of the screen.
- 2 . Click on the 'Item Name to Left' option to display the item label to the right of the screen and item name to the left.

- **Change Font**

The 'Change Font' option allows you to change the font size displayed in the data table. To change the font size, click on the 'Change Font' option to display the Font Selection screen:

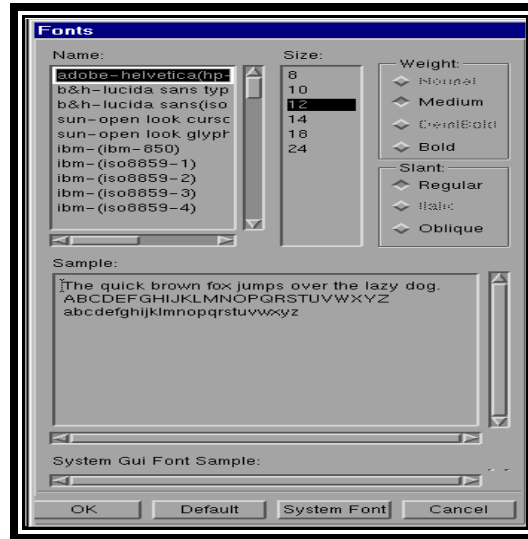


Figure 4.2.1c Change Font screen

1. Choose a font by clicking on a font name, size, weight, and/or slant.
2. Click on “OK” to save your selection and return to the ID by Item screen.
3. Click on “Default” for default font settings for the ID by Item screen.
4. Click on “System Font” to ignore any changes you have made and revert back to the StEPS default font size identified in USER SETUP (See Section 1.3 in manual).
5. Click on “Cancel” to exit this screen without changing your previous font selection.

● Display Colors

The ‘Display Color’ option allows you to view various colors in the data table. Click on the ‘Do not display color in the table’ option to remove colors from within the data table. Distinctive colors in the data table are as follows:

Sky blue	Non-correctable data field and/or a StEPS standard protected field.
White	Correctable data field.
Red	Item with an edit failure.
Pink	Not a valid item for the specified stat period.
Yellow	No C1 record for the ID for the specified stat period.
Light green	Stat period is not correctable. CORFLG in SURVLIB.VSTATPS is set to ‘N’ and you do not have the proper privileges.
Teal	Item data field is not correctable. CORFLG in dictionary is set to ‘U’ or missing and you do not have the proper privileges (DATAPRIV=‘N’).
Dark Blue	Item data field has been modified and corrections have not yet been applied.

Light skyblue Correctable reported data field.

- **Display Real Number where applied**

This feature gives you the option to display or not display adjusted data in real number format. Choosing to not display real numbers will display rounded adjusted data figures with commas. Displaying data in real number format shows non-rounded adjusted data with decimals and without commas.

- **Display EFLG4 Confirmation**

This option allows you to display or not display the EFLG4 conformation message. For surveys using the screened sums flag (EFLG4), a confirmation message will display if the edited data value is changed.

Save when EXIT

The ‘Save when Exit’ option allows you to save only those options located in the ‘Display Options’ section of the ID by Item screen. If you choose to exit the screen or log out of StEPS, all previously selected display options will remain effective upon return to the screen if the ‘Save when EXIT’ check box is selected.

Click on the ‘Save when EXIT’ button to save the display options when you exit the screen. The check box will be blackened. You can turn the option off by clicking on the field again.

4.2.1c DETAIL OF WORKING ID

The “Detail of working ID” section contains detailed information pertaining to the ID selected. This section will display the following fields:

Working ID

- Displays the ID whose data is currently being displayed on the screen. If you enter a new ID or enter an ID incorrectly in the ‘Enter ID’ field in main header section, this working ID section allows you to view what ID data is actually being displayed within the data table.
- This field is not correctable.
- Select a new ID to review by keying in the ID or selecting an ID from the picklist in the ID field in the ‘Main Header’ section.

Name

- Displays the name of the ID specified in the working ID field.
 - This field is not correctable.
 - You must access the Control Information screen to make changes to the Name field. (Access the Control Information screen by pressing Ctrl-C, or use the GOTO pmenu option.)
-

Info

- Displays additional control information for the working ID.
 - You can view other IDs based on the characteristics of the case in review by clicking on the control variable. (e.g. If City = 'Fargo' for the ID currently being reviewed, clicking on the city field will display a list of other IDs that share the same city within the selection set.)
-

All Items =

- Displays the number of items that exist in the item file (ITyyyypp) as well as all other items defined in the item dictionary for the survey. (**Note:** 'All Form Items' will only be displayed when 'Y' is selected for the 'Display all form items in the review and correction screens' option in the *Data Review Specification* or *Survey Setup* buttons under the Survey Specification module).
 - This field is not correctable.
-

Subset Items =

- Displays the number of items meeting the criteria specified under the "Rows to View" option. (**Note:** This field will only appear when an option other than 'All' has been selected from the 'Rows to view' option. See 'Display Options' section for detail).
 - This field is not correctable.
-

Weight

- Displays the weight used to calculate WDDATA on the item record for the ID.
 - This field is not correctable.
 - You must access the Control Information screen (and have the proper privileges) to change the weight (WGT) of an ID. (Access the Control Information screen by pressing Ctrl-C, or use the GOTO pmenu option.)
-

ID Flags

ID flags provide information regarding the case ID:

- N Notes exist for this ID; click on the 'N' to access the Notes screen.
- R Respondent text exists for this ID; click on the 'R' to access the Respondent Text screen
- S Survey-level edit rejects exist for this ID; click on the 'S' to access the rejects.
- U User-level edit rejects exist for this ID; click on the 'U' to access the rejects.
- W Single ID edit rejects exist for this ID; Click on the 'W' to access the rejects.

NOTE: For more information on the different types of edits, see Chapter 8.

SIC

- Displays the SIC (Standard Industrial Classification Code) for the case ID.
 - This field is not correctable.
 - You must access the Control Information screen (and have the proper privileges) to change the SIC. (Access the Control Information screen by pressing Ctrl-C, or use the GOTO pmenu option.)
-

Check-in

- Displays the date that the data was received (checked-in) for the case.
- Enter date in YYMMDD format, where YY=year, MM=month, DD=date.

NOTE: If you change item data for an ID, the program will automatically prompt you for a check-in date (if one does not exist) when you apply the changes to the database. You have the option of inserting the current date into the check-in date field, however, it is not required.

Bypass

- Indicates whether an ID should be included in various types of processing.

- Click on the arrow in the bypass field to bring up the Set Bypass Flags screen. The default for each of the bypass options is 'blank', meaning the processing operation is to be performed.

BYEDIT	blank	Edit this ID
	B	Do not edit this ID
BYSIMP	blank	Perform simple imputation on this ID
	B	Do not perform simple imputation on this ID
BYGIMP	blank	Perform general imputation on this ID
	B	Do not perform general imputation on this ID
BYIMPB	blank	Include this ID in the imputation base
	B	Do not include this ID in the imputation base
BYBUR	blank	Performs batch update on this ID
	B	No batch updates should take place for ID
BYSPLT	blank	Split this ID
	B	Do not split this ID

Note: BYSPLT is only active when an ID is a parent record (PCFLG = 'P'). Otherwise, this option will be inactive (grayed out).

- To set the bypass flag for any of the processes listed above, click on the button next to the appropriate field. The box will be blackened if the bypass flag has been set. You can turn the bypass off, by clicking on the field again.

NAICS

- The NAICS (North American Industry Classification System) code for the case ID.
- This field is not correctable.
- You must access the Control Information screen (and have the proper privileges) to change the NAICS. (Access the Control Information screen by pressing Ctrl-C, or use the GOTO pmenu option.)

Data Source

- The Data Source field displays a flag which indicates the source of the data for the ID. Data may have been obtained by an analyst, keyed in J'ville, received via fax, etc. Data source flags include the following:

Blank	Case has not been satisfied
A	Analyst phone contact
C	CATI
E	EDI
F	Report form keyed via Key Entry 3
I	Internet
J	Clerk phone contact
O	Other
P	CAPI
Q	CSAQ
R	Respondent phone-in
S	Self filer
T	TDE
X	Fax

- To change (or set) a data source flag, click on the arrow in the Data Source field to display a pick list of data source flags and corresponding definitions. Click on the flag you wish to set.
- When data is keyed in the interactive Review and Correction system AND a check-in date is supplied, the data source flag will default to 'A'. (If you want to set a different data source flag for data you have just keyed, you must apply the data updates first and then go back and change the data source flag.)

User Defined Line

Displays select control information fields at the user- or survey- level. These fields must be identified in the Survey Specifications module. (See Chapter 2.8, Data Review Specifications, for information on creating/editing this line.)

4.2.2 ITEM DATA SECTION

The Item Data Section contains detailed item data for the ID displayed in the Working ID section. See below for detailed descriptions of each field.

4.2.2a COLUMNS DISPLAYED WHEN ONE STAT PERIOD SELECTED

Item Name

- Displays the 5-character item code or mnemonic (defined in the Item Data Dictionary). The order in which the item codes are displayed is controlled by the row (ROW) and column (COL) fields specified in the Item Data Dictionary. (See Chapter 2.1.1, Item Data Dictionary, for more information on specifying a 'column' and 'row'.)

- Add an item record by selecting the “Add Item” option from the EDIT pmenu. Items must already be defined in the Item Data Dictionary before you can add them here. (See Chapter 4.9 for detailed information on the Add item screen.)
 - Click on the item code to access the following information regarding the item:
 - Item name: Item Dict. Info.
Displays information on the item as displayed in the Item Data Dictionary.
 - Item current/prior ratio - weight
Displays the current/prior ratio - weight for the item.
 - Item records
Displays a temporary file containing current and prior stat period(s) data for the item.
 - Item History
Displays a temporary file containing an audit trail of the item.
 - Undo Changes for the Item (This option is only available when you make data changes and corrections have not yet been applied, otherwise, the option is inactive).
Select to undo the changes that were made to an item data value.
 - View Edit Failures (This option is only available if edit failures exist for the item.)
Displays a temporary file containing the edit failure message(s) for the item.
 - Phase Item Records (This option is only displayed if your survey uses phase data.)
Displays a temporary file containing current and prior stat period(s) phase data records for the item.
-

Notes Flag (N)

StEPS contains a Notes file, which allows you to store notes or comments about a case ID. Notes may be entered at the ID-level or may be associated with a specific item within an ID. There are 3 different types of notes: analyst, interviewer, and respondent remarks. (See Chapter 4.8, Notes, for more information on the different types of notes and how to use the Notes screen.)

- If a note exists for an ID at the item- level, an ‘N’ will appear in the Notes column next to the item in which it is associated. Click on ‘N’ to display the note associated with the item. (See Chapter 4.8, Notes, for more information on the different types of notes and how to use the Notes screen.)
 - If any note (item- or ID-level in DATALIB.NOTES) exists for an ID, an “N” will be displayed in the ‘ID Flags’ field in the working ID section. Click on ‘N’ to access the Notes screen for the ID.
-

Respondent Text Flag (R)

Respondent text refers to a textual (as opposed to ‘numeric’) response to an item on the form. Since the data is not a numeric response, it must be kept in a separate file from the numeric data items. Not all surveys have respondent text.

- If respondent text exists for an ID at the item- level, a ‘R’ will be displayed in the Respondent Text column next to the item in which it is associated. Click on the ‘R’ to display the respondent text associated with the item.
- If respondent text exists for an ID in (DATA##.RTyyyypp) , an ‘R’ will be displayed in the ‘ID Flags’ field in the working ID section. Click on the ‘R’ to access the respondent text screen for the ID.

Note: Not all surveys have respondent text. (See Chapter 4.12, Respondent Text, for more information on how to view/edit textual responses in the Respondent text screen.)

Imputation Action Flag (I)

- Associated with each item is an imputation action flag (IMPACT). The imputation action flag (IMPACT) controls whether an item value is to be imputed. To set an imputation action flag, click on the Imputation action flag field to display the following:

Y	Impute regardless of rules
N	Do not impute even if failure
Blank	Default; follow rules to determine if impute or not
X	Follow rules to impute but exclude from imputation base

- To set an imputation action flag, click on the Imputation Action Flag field to display a pick list of imputation action flags and corresponding definitions. Click on the flag you wish to set.

Edit Flags (E1, E2, E3, <statp> E4)

- Edit flag 1 an edit referral flag that is set in the general imputation module. Click on the Edit flag 1 column to view the following possible entries:

R	Indicates a review is needed.
Blank	No review is necessary

- Edit flag 2 a flag identifying an item that is populated with administrative data that is to be treated as reported data. Click on a field in the E2 flag column to set the following flags:

W	Administrative data treated as reported data.
Blank	Not administrative data to be treated as reported data.

- Edit flag 3 used in the Hidioglou-Berthelot edit method to detect possible outlier cases on a comparison of two item data variables. (See Chapter 8.8, H-B edits, for detailed information regarding setting H-B edit flags.) Click on the Edit flag 3 flag type or the column heading to view all possible entries:

R	Item requires analyst review.
S	Item is to be excluded from the imputation base, considered for imputation only if edit reject, and requires analyst review.
I	Item is to be excluded from the imputation base, considered for imputation, and requires analyst review.
Blank	Item was not subjected to the H-B edit or H-B edit has determined this item needs no further action as a result of the edit.

- Edit flag 4 the screened sum flag <Statp>E4, displayed for cases that use the link-relative estimation methodology. Click on a field in the Edit flag 4 column to choose from one of the following options:

B	Bad data
D	Data is correct; current period and prior period are on a different basis
I	Item passed edit
O	Item failed edit, omit
L	Data is correct; current period and prior period are comparable, large impact on estimate
S	Estimate separately
U	Item failed edit; include at users discretion
Blank	Initial value

Reported Data for Current Stat Period (yyyypp Reported)

- Displays “reported” data by the respondent for the current stat period (RPDATA from DATA00.ITyyyypp). Data reported by the respondent or received through batch update is displayed in this column.
- The reported data field is correctable if it meets the following criteria:
 1. You have the proper privileges to correct data (DATAPRIV= ‘U’ or ‘P’)
 2. The data item is specified in the Item Data Dictionary as being a correctable field (CORFLG NE = ‘N’)
 3. The stat period is specified in the VSTATPS file as being a correctable stat period.

- A conformation message will display when applying corrections to reported data.
 - Data values entered in the reported data field will only be applied to current stat period edited data if the value of the data flag (for the current stat period edited data) is either 'M' or 'blank'.
-

Edited-Unadjusted Data (yyyypp Edited)

- Displays “edited” data for the current stat period (EDDATA from DATA00.ITyyyypp).
 - If more than one stat period is specified in the main header section of this screen or in the Review and Correction Main Menu, the “edited” data for the prior stat period(s) (EDDATA from DATA01.ITyyyypp and EDDATA from DATA02.ITyyyypp) will be displayed.
 - Data should be correctable if it meets the following criteria:
 1. You have the proper privileges to correct data (DATAPRIV= 'U' or 'P')
 2. The data item is specified in the Item Data Dictionary as being a correctable field (CORFLG NE = 'N')
 3. The stat period is specified in the VSTATPS file as being a correctable stat period.
 - If you attempt to correct a field and you do not have the proper privileges, an error message will display. (See Section 4.2.3 MAKING CORRECTIONS, for more information on entering/correcting data.)
-

Adjusted Data

- Displays “adjusted” data by the respondent for the current stat period (ADDDATA from DATA00.ITyyyypp).
- If more than one stat period is specified in the main header section of this screen or in the Review and Correction Main Menu, the “adjusted” data for the prior stat period(s) (ADDDATA from DATA01.ITyyyypp and ADDDATA from DATA02.ITyyyypp) will be displayed.
- The adjusted data field is correctable if it meets the following criteria:
 1. You have the proper privileges to correct data (DATAPRIV= 'U' or 'P')
 2. The data item is specified in the Item Data Dictionary as being a correctable field (CORFLG NE = 'N')
 3. The adjust flag (ADJFLG) in the item data dictionary is set to 'Y' for the data item.
 4. The stat period is specified in the VSTATPS file as being a correctable stat period.
 5. A record of UPD_ADJUST='Y' exist in the PARMLIB.SURVPARM file.

- Only the current period adjusted data can be corrected.
- Data values entered in the adjusted data field will only be applied to current stat period edited data if the value of the data flag (for the current stat period edited data) is either 'M' or 'blank'.

Data Flags (D)

- Associated with each item value is a data flag that identifies the source of the edited data item value. Data flags include the following:

Flag	Definition	Set By:	Tabbed as:
A	<u>A</u>nalyst correction Data corrections entered by the analyst ('A' is the default flag in the interactive Review and Correction system)	Analyst	Reported
C	<u>C</u>hange to prior period data Prior period data that is reported on the current period form	Batch update program	Reported
D	<u>D</u>erived data treated as reported The data item is not collected, but its value is derived from the values of other data items in the survey; treated as reported	Derived item module	Reported
E	<u>E</u>dit failure impute treated as reported Computer-generated data value resulting from an edit failure (e.g., balance, rounding); treated as reported data	Imputation program	Reported
F	<u>F</u>ailure impute treated as imputed Computer-generated data value resulting from an edit failure; treated as imputed data	Imputation program	Imputed
H	<u>H</u>istoric change **** To be defined at a later date	Batch update program; Analyst	Reported
I	<u>I</u>mpute Data imputed by the analyst and entered using the interactive Review and Correction system	Analyst	Imputed
M	<u>M</u>isreporting Data value imputed due to ID nonresponse	Imputation program	Imputed
R	<u>R</u>espondent reported data Data reported by the respondent (regardless of collection method)	Batch update program; Analyst	Reported

Flag	Definition	Set By:	Tabbed as:
S	Other source treated as reported Reported data value that has originated from some other source; value was not collected on the form, computer-generated, or derived (excludes administrative data which is designated by flag 'W')	Batch update program; Analyst	Reported
T	Other source treated as imputed Imputed data value that has originated from some other source; value was not imputed by the analyst, computer-generated, or derived (excludes administrative data which is designated by flag 'Y')	Batch update program; Analyst	Imputed
V	Derived data treated as imputed The data item is not collected, but its value is derived from the values of other data items collected on the survey; treated as imputed if one or more of the data values included in the derived value is imputed	Derived item module	Imputed
W	Administrative data treated as reported Reported data value taken from the administrative records of the IRS	Batch update program; Analyst	Reported
Y	Administrative data treated as imputed Imputed data value taken from the administrative records of the IRS	Batch update program; Analyst	Imputed

- If no default flag has been specified in the 'Default Flag' option in the Main Header section, the data flag screen will automatically display whenever you edit or add data in an item field.. Press <ENTER> to select the default flag of 'A' for 'analyst correction' after corrections.
- If you do not want to use the default data flag 'A', click on the data flag field to display the Data Flag screen and select another using the mouse. Some data flags are set by various programs within StEPS. Your data flag choice will be limited to those that are correctable by 'analysts' only. (See the "Set by:" column in the Data Flag table above).

Imputation Flags (I)

Associated with each item is an imputation flag. Imputation flags are set by the imputation program to identify the routine used to impute the data.

Imputation Flag	Method	Type of Imputation	Simple/General Imputation	Put in Imputation Reject File	Use in Imputation Base
A	SUM	Item	G	Yes	No
B	Custom method 1	Item	G	Yes	DK
C	Custom method 2	Item	G	No	DK
D	RESIDUAL	Complex	S&G	No	No
E	RESIDUA	Item	G	Yes	No

Imputation Flag	Method	Type of Imputation	Simple/General Imputation	Put in Imputation Reject File	Use in Imputation Base
F	Free form	Item	S	No	No
G	SIMPREG	Item	G	Yes	No
H	MULTREG	Item	G	Yes	No
I	RATIO	Item	G	Yes	Yes
	IMPALL	Complex			
J	AUXRAT	Item	G	Yes	Yes
K	RAKEIMP	Complex	G	Yes	No
L	unused				
M	MEAN	Item	G	Yes	Yes
N	Unable to impute	Item	G	No	No
O	ROUND	Complex	G	No	No
P	PCTRAT	Item	G	Yes	Yes
Q	unused				
R	RAKE	Complex	S&G	No	No
S	NSK	Complex	G	No	No
T	ATREND	Item	G	Yes	No
U	unused				
V	VALUE	Item	G	Yes	No
W	unused				
X	PRODUCT	Item	G	Yes	No
Y	YSUMX	Complex	S&G	No	No
Z	ZERO_SET	Complex	S&G	No	No

Note: If changes are made to the item data and its corresponding data flag for any of the stat periods and a flag exist in the imputation flag field, the imputation flag field will automatically be cleared.

Item Label

Associated with each item is a label. The label, specified in the Item Data Dictionary, identifies what the item means. The item label is displayed in the last column on the right side of the new ID by Item screen. Since space on the screen is limited, the entire label may not be viewed in its entirety. Thus, you can utilize the horizontal scroll button at the bottom of the screen to display the remaining columns. For a more detailed description of the item, you can click on the Item name in Column 1 or access the Item Data Dictionary screen. (See Chapter 2.1.1, Item Data Dictionary, for more information on the Item label.)

4.2.2b ADDITIONAL COLUMNS FOR MULTIPLE STAT PERIODS

When more than one stat period is selected for review, the ID by Item screen displays data for the most recent stat period in the columns for current stat period. Data for the most recent prior stat period selected is displayed in the second set of columns. Data for the prior/prior period is displayed in the right-most set of columns. The stat period identifier (yyyypp) is displayed as part of the column heading. A blank column indicates no data exists.

Prior Period (yyyypp) E4 Data

Reported Data for Prior Stat Period (yyyypp Reported)

Edited-Unadjusted Data for Prior Stat Period (yyyypp - Edited)

Data flags for Prior Stat Period (D)

Imputation flags for Prior Stat Period (I)

Adjusted Data for Prior Stat Period (yyyypp - Adjusted)

Current-to-Prior Period Ratio

- Displays a ratio of the current period edited data as compared to the prior period. Value is computed as:

$$(C - P) / P * 100$$

where 'C' = current period edited data and 'P' = prior period edited data.

- Data is not correctable.

Current - Prior

- Displays the difference between the current period edited data and the prior period edited data for the item in review.
- Data is not correctable.

Prior/Prior Period (yyyypp) E4 Data

Reported Data for Prior/Prior Stat Period (yyyypp Reported)

Edited-Unadjusted Data for Prior/Prior Stat Period (yyyypp - Edited)

Data flags for Prior/Prior Period (D)

Imputation flags for Prior/Prior Period (I)

Adjusted Data for Prior Stat Period (yyyypp - Adjusted)

4.2.3 MAKING CORRECTIONS

- You can correct the ‘reported and ‘edited’ versions of the data provided:
 1. You have the proper privileges to correct data (DATAPRIV = ‘U’ or ‘P’).
 2. The item is specified in the Item Data Dictionary as being a correctable field (CORFLG = ‘U’ or ‘P’).
 3. The stat period is specified in the VSTATPS file as being a correctable stat period.

An error message will display if you attempt to correct a field that is not correctable or if you do not have the proper privileges.

- You can type over an existing value or delete the contents of a field to enter a different value. (Click in the item data field, press the DELETE key, backspace, or spacebar, then press <ENTER> to delete the contents of a field.)
- Enter the data value in the item data field that you want to change and press <ENTER>.

NOTE: YOU MUST PRESS <ENTER> EACH TIME YOU ENTER OR CHANGE A DATA VALUE!

- Unless otherwise specified in the ‘Default Flag’ option in the Main Header section, if no default data flag has been selected, the data flag pop-up window will automatically display when you edit or add data in the item field. Press <ENTER> to select the default flag of ‘A’ for ‘Analyst correction’. You can also choose a different flag by clicking in the data flag field and using the mouse to select another flag. Press <ENTER> to accept the flag.
- Once you have completed all changes to an ID, you can save the changes by:
 1. Selecting the “Apply Corrections” option from the EDIT pmenu.
 2. Pressing “F2”.
 3. Pressing the “F9” key to apply corrections + run survey defined processes.
- Cancel corrections by:
 1. Exiting the screen without applying corrections.
 2. Selecting the “Undo” option from the EDIT pmenu. (You can “undo” corrections as long as they have not yet been applied.)

3. Selecting the “Undo Changes for the Item” option by clicking on the Item Name for which a change was made. (You can “undo” corrections using this feature as long as they have not yet been applied.)
- You must apply corrections before exiting the ID by Item screen. If you attempt to exit the screen without first applying the corrections, a warning message will display:



Figure 4.2.3a Apply Corrections Confirmation Screen

1. Click on “Yes” to apply the corrections.
 2. Click on “No” to cancel the changes.
- If you access an ID that has no check-in date, you will be prompted to enter one when you exit the ID by Item screen:

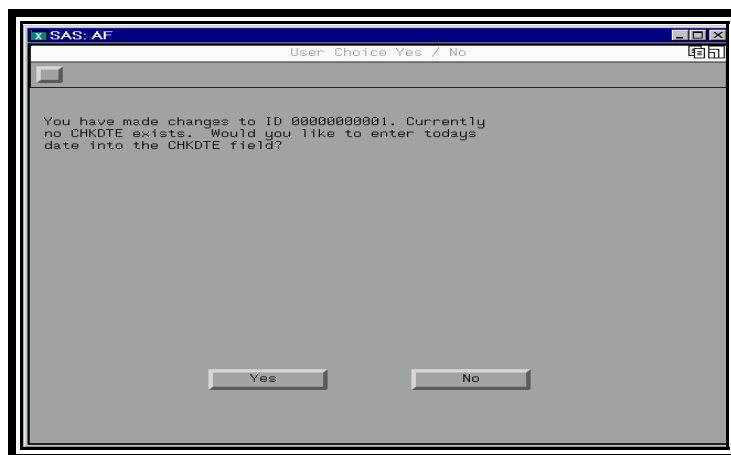


Figure 4.2.3b Check-In Date Confirmation

1. Click on “Yes” to have today’s date inserted into the check-in date field.
 2. Click on “No” if you do not want to insert today’s date into the check-in date field.
- A item audit trail (DATALIB.ITAUDIT) will be created for all corrections applied to the database. The following fields will be included in the item audit trail:

SURVEY	Survey name
STATP	Statistical period
ID	Case ID
ITEM	Item Code/mnemonic
OLDFLAG	Data flag before change
NEWFLAG	Data flag after change
OLDVAL	Value of item before change
NEWVAL	Value of item after change
USRNME	Name of user who made the change
PRGNME	Name of program to update the value
PRGDTM	Date/time the update took place
DTTYPE	Data type (Reported, Edited, Adjusted, Weighted)

- To access the Item Audit Trail:
 1. Click on “Item Data” from the GOTO pmenu..
 2. Click on “Audit Trail”.
 3. Choose “Item Audit by ID” or “Item Audit by Date”.

4.2.4 RUN SINGLE ID EDIT

- Run a simple edit on the ID by clicking on the EDIT pmenu and selecting the “Run edit” option.
- The “Run edit” option will run all edit tests that have been defined in the “Edit Definitions” of the EDIT module as active for the “Single ID” test. (See Chapter 8 for a discussion of Edit Definitions and the Run edit option.) If the ID fails any of the single ID edit tests, an error message will display indicating the number of rejects:



Figure 4.2.4a Number of Edit Rejects Screen

- Click on “OK” to display the edit reject messages:

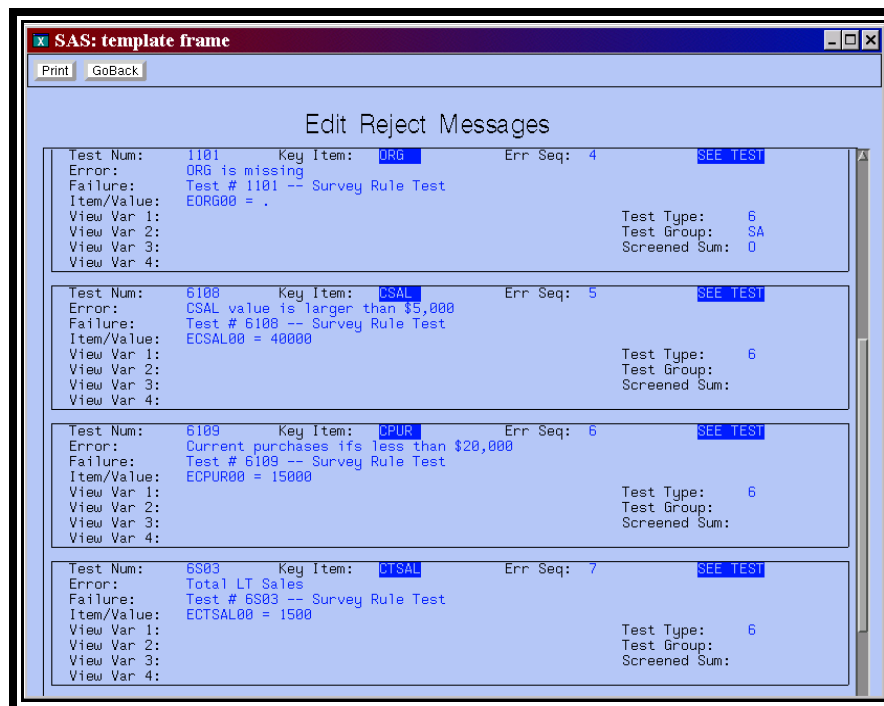


Figure 4.2.4b Edit Reject Message Screen

Test Num	Edit test number as defined in the Edit Definitions screen
Key Item	The item to be reviewed as having a edit failure
Err Seq	Sequence number of edit reject messages (i.e., If '3' edits are listed, error sequence numbers 1 through 3 will be displayed.)
Error	The Error List message as identified in the Edit Definitions screen
Failure	Test # and type of edit failure (i.e., List Directed, Balance, Required Item, Survey Rule)

Item/Value	Key Item and its corresponding value that is in question.
View Var 1-4	Secondary review items
Test Type	Type of edit failure (i.e., '1' = Required Item, '6' = Survey Rule)
Test Group	The group for which the edit test is assigned. (See Chapter 8, Edits, regarding setting test groups.)
Screened Sum	Option used by surveys using the link-relative estimation methodology.

- The Edit Reject Message screen is for viewing purposes only. You cannot correct the rejects on this screen. Data corrections must be made in one of the Review and Correction screens (i.e., ID by Item, ID Matrix, Roster Item Matrix).
- Click on the PRINT button at the top of the screen to print the edit rejects for the ID.
- Click on the GOBACK button at the top of the screen to return to the ID by Item screen.
- Click on the “Key Item” and the selected item will be positioned at the top of the data table on the screen.
- Click on “SEE TEST” (in the upper right corner of the test block) to access the actual parameter entry for the test.
- If edit rejects are identified through the “Run edit” option on this screen, a ‘W’ will be displayed in the ID Flags field in the Control Information section. The ‘W’ indicates that single ID edit rejects exist for this ID. At any time, you can click on the ‘W’ to display a list of the edit rejects, as shown in Figure 4.2.4b. The ‘W’ will remain in the ID Flags field until you correct all rejects and rerun the edit.
- Press F3 to exit this screen. (See Chapter 8 for more information on Edits.)
- If edit rejects are identified through the “Run single ID edit”, those items that have edit failures, along with their labels, will be highlighted in red text on the ID by Item screen:

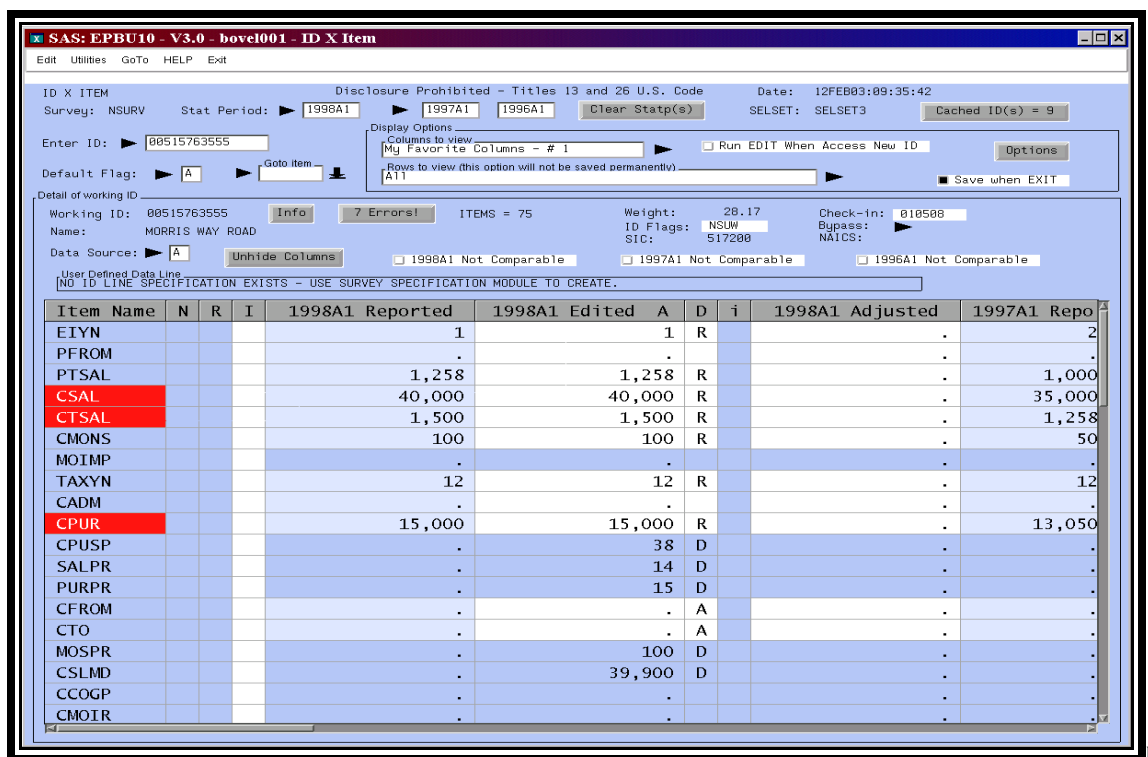


Figure 4.2.4d ID by Item screen with Edit failures

- The message ‘# Errors!’ will appear in the ‘Detail of working ID’ section listing those items that have edit failures. The # symbol will denote the number of errors that exist. Click on the button to view a list of items that have edit failures:
 1. Click on “View All Edit Failures” to display the failures in the Edit Reject Message screen.
 2. Click on an Item and the selected item will be positioned at the top of the data table on the screen.
- The items with edit failures will remain highlighted until you correct all rejects and rerun the edit. Once all edit failures have been corrected, the ‘# Errors!’ message will be removed.

4.2.5 WEIGHT ITEMS

Some IDs have weights. If you make changes to the edited-unadjusted data, the weighted data will not reflect these changes, unless you re-weight the data.

You can weight the item data for an individual ID or for all IDs at one time. To weight items for the ID specified in the Control Information section, select the “Weight items” option from the EDIT pmenu.

If you prefer to make corrections to many IDs and then weight the data for the whole survey all at once, you can do so using the “Estimation” option in the RUN PROCESSES module. You must have the proper privileges to run the weight program for the entire survey.

4.2.6 DERIVE ITEMS

Some IDs have derived items. Derived items are items that are not actually collected for a survey, but that are calculated or derived from other items. These other items may be items that are on the form or may be derived items themselves. If you have made changes to edited-unadjusted data, your derived roster item values will not reflect these changes, until you run the derived item program.

You can derive the item values for an individual ID or for all IDs at once. To derive items for the ID specified in the Control Information section, select the “Derive Items” option from the EDIT pmenu. If you prefer to make corrections to many IDs and then derive items for the whole survey all at once, you can do so using the “Derived” option in the RUN PROCESSES module.

After the program has run, a message will display, indicating that the run has been completed. The program will assign derived item values a data flag of ‘D’ or ‘V’. ‘D’ indicates that the derived item value is to be treated as reported data. ‘V’ indicates that the derived item value is to be treated as imputed data.

4.2.7 RUN SIMPLE IMPUTATION

Run simple imputation on the ID by clicking on the EDIT pmenu and selecting the “Run Simple Imputation” option. Simple imputation tests that have been defined in the Simple Imputation module as active will be run. (See Chapter 9 for more information on Imputation.)

When the program has finished executing, a message will display, indicating that the run has been completed. The program will assign imputed values a data flag of ‘E’. ‘E’ indicates that the imputed item value is to be treated as reported data.

4.2.8 RUN SIMPLE IMPUTATION AND EDIT

Run both the simple imputation AND the edit on the ID by clicking on the EDIT pmenu and selecting the “Run Simple Imputation and Edit” option. See Sections 4.2.6 and 4.2.7, above, for more information.

4.2.9 THE ID BY ITEM - CP SCREEN

The ID by Item - CP screen (CP stands for Current/Prior) was developed to allow you to:

- Compare data values for an item as collected in 2 different stat periods (the current stat period and the prior stat period) to determine consistency over time.

- Correct the data and perform all of the editing functions available in the ID by Item Screen

To access this screen:

- Click on the REVIEW AND CORRECTION button from the StEPS Main Menu.
- From the Review and Correction Main Menu, choose Option 1 - Review & Correction via selection set.
- Select the GOTO pmenu option.
- Select "Item Data".
- Select "ID by Item - CP"(the CP stands for current/prior). The screen shown as 4.2.9a appears.

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ID X ITEM - CP Survey: NSURV Stat Period: 1998A1 SELSET: SELSET1
 ID: 99510587455 Data Source: F Weight: 350.07 Check-in: 990219
 Name: ID Flags: N SIC: 519900 Bypass: NAICS:

User Defined Data Line
 No id line specification exists - use survey specification module to create

ID by Item Data

Item	N	R	I	1998A1 A Edited Current	1998A1 A Edited Prior	((cur-pr)/pr) *100	1997A1 A Edited Current	1998A1 Reported Current
? CSAL	-	631,132	R	.	.	79,572	R	631132
? CTAX	-	0	EF	.	.	0	EF	.
? CTSAL	-	631,132	EY	.	.	79,572	R	.
? CMONS	-	203,952	S	.	.	.	.	.
? MOIMP	-	5	S	.	.	.	.	.
? TAXYN	-	2	R	.	.	2	R	.
? CADM	-	0	W	.	.	0	W	.
? CPUR	-	558,233	R	.	.	3,650	R	558233
? CPUSP	-	88	D	.	.	5	D	.
? SALPR	-	693	D	.	.	.	.	.
? PURPR	-	15,194	D	.	.	.	.	.
? CSLMD	-	427,100	D	.	.	.	.	.
? CCOGP	-	88	D	.	.	5	V	.
? CMOIR	-	2	S	.	.	.	.	.
? LIFYN	-	2	EF	.	.	2	EF	.

Figure 4.2.9a ID by Item - CP Screen

4.2.9a Screen Features

The header information is identical to the information in the header of the basic ID by Item screen. There are no display options for this screen.

Item data for the current and prior periods are displayed in the following columns:

Item

- For each item in the Item file (DATA00.ITyyyypp), StEPS will check the CPFLAG field (for that item) in PARMLIB.ITEMDICT. If CPFLAG = 'C' or <blank>, the item will display on the screen.
- Items are displayed in the same order as defined on the ID by Item screen.
- Click on the item name to display information from the Item Data Dictionary, just as on the ID by Item screen.
- Add an item record by selecting the “Add item” option from the EDIT pmenu. (See chapter 4.9 for detailed information on the Add Item screen.) Items must be in the Item Data Dictionary before you can add them.
- Create a record with all form items displayed on the screen by selecting the “Create item with all form items” option from the EDIT pmenu.

NOTE: Before displaying all form items on the ID by Item - CP screen, certain file requirements must be met.

1. A record must exist in the PARMLIB.SURVPARM file where PARMNAME = “ALLFORMITEMS” and CVALUE='Y'.
 2. The SURVLIB.FORM file must contain all valid forms for a survey.
 3. The FORM field in the PARMLIB.ITEMDICT and DATA00.C1yyyypp files must specify a valid form that is defined in the SURVLIB.FORM file. Valid values include '*' or blank for all forms and 'multiple' for more than one, but not all forms.
 4. If an item has a FORM value of 'multiple' in the dictionary, the PARMLIB.FORMITEM file must define all valid forms for that item.
- When using the ID by Item - CP screen in displaying current and prior stat period data, the CPFLAG and ITLINK fields must be identified in the Item Data Dictionary (PARMLIB.ITEMDICT file).
 1. If CPFLAG = 'C' and an ITLINK value exist, indicating that a current to prior relationship exist for the current stat period, the item for the current stat period and its associated item link (ITLINK) from the prior stat period will be displayed on the screen. For example, CSAL (current yr. sales) and PSAL (prior yr. sales) are data items on the “current” period form representing sale values collected during the current and prior year stat periods. In the Item Data Dictionary, Item CSAL should have a CPFLAG = 'C' and ITLINK = PSAL, in order to view current and prior year item data as it was collected on the current period form.
 2. If CPFLAG = 'P' and an ITLINK value exist, indicating that a current to prior relationship exist for the current stat period, the item for the prior stat period and its associated item link (ITLINK) from the current stat period will be displayed on the screen. As indicated in the example above, Item CSAL should have a CPFLAG = 'C' and an ITLINK = PSAL. However, for Item PSAL, it should have a CPFLAG = 'P' and an ITLINK = CSAL, in order to view current and prior year item data as it was collected on the current period form.

3. If CPFLAG = 'blank', only those items collected on the current period form for the current stat period will be displayed. No associated prior period items will be displayed.

Notes Flag (N)

- An "N" indicates the Item has a note in DATALIB.NOTES.
- Click on the 'N' in the Notes field to display the note(s) pertaining to that particular item. (See ID by Item screen.)

Respondent Text Flag (R)

- An "R" in the Respondent Text column indicates the Item has Respondent Text.
- Click on the "R" in the Respondent Text field to display the respondent text pertaining to that particular ID. (See ID by Item screen.)
- Some respondent text may be associated with a specific numeric data item. If this is the case, an "R" also will be displayed in the Respondent Text column next to the item with which it is associated. Click on the "R" to display the text associated with the item.

Imputation Action Flag (I)

- Displays the imputation action flag for the item specified in the Item column.
- Clicks on the imputation action flag field, display a pick list of potential imputation action flags from which to choose:

Blank	Default; follow rules to determine if impute or not
N	Do not impute even if failure
Y	Impute regardless of rules
X	Follow rules to impute but exclude from imputation base

Current Period "Edited" Data for Current Stat Period (<yyyp> Edited Current)

- Displays the current stat period "edited" data value (E<item>00 from DATA00.IT~~yyyypp~~) for the item specified in the Item column.
- Data is correctable if:
 1. You have the proper privileges to correct data (DATAPRIV = U or P).
 2. The data item is specified in the Item Data Dictionary as being a correctable field (CORFLG = U or P).
 3. The stat period is specified in the VSTATP file as being a correctable stat period.

If you attempt to correct a field and you do not have the proper privileges, an error message will display. (See MAKING CORRECTIONS, below, for more information on entering/correcting data.)

Data Flag for Current Edited Data

Displays the data flag associated with the “edited” data value of the item specified in the Item column. (See ID by Item screen.)

Prior Period “Edited” Data for Current Stat Period (<stat period> Edited Prior)

StEPS checks to see if prior period data was collected during this stat period. If yes:

- Displays the specified prior period edited data as collected in the current stat period.
- If CPFLAG = 'C' and an ITLINK value exist in the PARMLIB.ITEMDICT file, the “edited” data value for the item specified in the ITLINK field will be displayed.
- Data is correctable if:
 1. You have the proper privileges to correct data (DATAPRIV = U or P).
 2. The data item is specified in the Item Data Dictionary as being a correctable field

Data Flag for Edited Prior Data

Displays the data flag associated with the “edited” data value. (See ID by Item screen.)

Current-to-Prior Period Ratio ((cur-pr/pr)*100)

- Displays a ratio of the current period edited data as compared to the prior period. Value is computed as:

$$(C - P) / P * 100$$

where 'C' = current period edited data and 'P' = prior period edited data.

- Data is not correctable

Edited Data for Prior Stat Period (<prior stat period> Edited Current)

- Displays the edited data as collected in the specified prior stat period.
- Data is correctable if:
 1. You have the proper privileges to correct data (DATAPRIV = U or P).
 2. The data item is specified in the Item Data Dictionary as being a correctable field (CORFLG = U or P).
 3. The stat period is specified in the VSTATP file as being a correctable stat period.

Data Flag for Edited Current Data

Displays the data flag associated with the “edited” data value. (See ID by Item screen.)

Current period reported data for current stat period (<stat period> Reported Current)

- Displays the data reported by the respondent for the item as collected in the current stat period. (Only ‘reported’ data received through batch update will appear in this field.)
- Field not correctable.
- Data can be corrected in the edited field only.

Data Flag for Reported Current Data

Displays the data flag associated with the reported data value. (See ID by Item screen.)

Prior Period Reported Data for Current Stat Period (<stat period> Reported Prior)

- Displays the specified prior period data reported by the respondent for the item as collected in the current stat period. (Only ‘reported’ data received through batch update will appear in this field.)
- If CPFLAG = ‘C’ and an ITLINK value exist in the PARMLIB.ITEMDICT file, the “reported” data value for the item specified in the ITLINK field will be displayed.
- Field not correctable.
- Data can be corrected in the edited field only.

Data Flag for Reported Prior Data

Displays the data flag associated with the reported data value. (See ID by Item screen.)

Label

The LABEL (from the Item Data Dictionary) for the item specified in the Item column.

As with the ID by Item screen, this screen enables you to edit individual data items, add items, delete items, run edits, derive or weight items and run sample imputations. The following functions are available on the from the EDIT option on the pmenu:

- Apply corrections (F2)
- Undo
- Delete (F6)
- Add item
- Create record with all form items
- Delete current items with no data

- Run edit
- Derive items
- Weight items
- Run simple imputation
- Run simple imputation and edit

These functions are explained in detail in sections 4.2.3 through 4.2.8.

4.2.9b Troubleshooting Problems with the ID by Item - CP Screen

The correct operation of the current/prior screen, and especially the ALLFORMITEMS function, depends on the validity and consistency of the survey's form parameter files (SURVLIB.FORM, PARMLIB.FORMITEM, PARMLIB.ITEMDICT, PARMLIB.SURVPARM, AND DATA00.C1YYYYPP).

The following screens show examples of the pop-up windows that inform users of incorrect form parameter files when they attempt to use the ALLFORMITEMS function. Following each screen is a discussion of what the error message appeared and how to correct the problem.

First, always remember that you will ALWAYS see any items that are in the item file. The program will then attempt to show you any other form items that are valid for that ID. During screen initialization, the program builds a list of all valid forms and their associated items. It is at this time, that users may be informed of inconsistencies that exist in various form parameter files. In general, the pop-up messages warn the user that a particular item MAY NOT appear on the screen because of inconsistencies in form parameter files. The following three pop-up windows illustrate this.

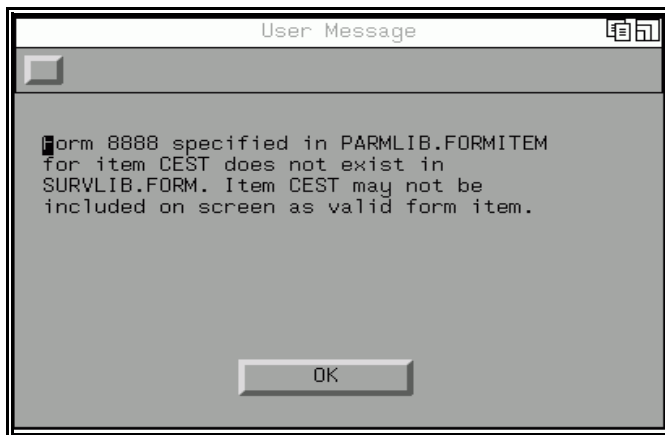


Figure 4.2.9b

In this example, the program has discovered that item CEST was defined in the dictionary with a FORM='multiple' indicating that the item exists on more than one form but not all forms. This triggers a search of the PARMLIB.FORMITEM data set to get the valid forms for item CEST. The message indicates that PARMLIB.FORMITEM contains a form specification that is not defined as a valid form in SURVLIB.FORM. Notice the message says that the form MAY NOT appear on the screen. Remember I said before that items that are in the item data set will always appear on the screen. If CEST is in

the item data set, it will appear. Also, it may be that this entry in PARMLIB.FORMITEM is completely bogus. As long as a correct entry exists for CEST in PARMLIB.FORMITEM that coincides with whatever form is associated with the ID on the screen, you will see CEST. The message simply alerts the user that PARMLIB.FORMITEM is not completely accurate and needs to be investigated.

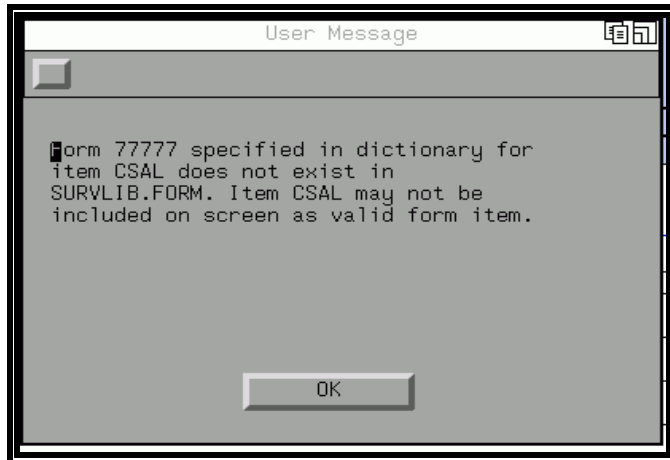


Figure 4.2.9c

In this example, the item dictionary has defined CSAL as only being valid for FORM='77777'. The problem is that 77777 is not defined in SURVLIB.FORM. If CSAL exists on the item data set, you will still see the item. If CSAL is not on the item data set, you will not see it on the screen because the program was unable to determine a valid form for this item and therefore does not know when to display it. Either the dictionary definition or the SURVLIB.FORM file needs to be investigated.

This example indicates a more serious problem that prevents additional form items from appearing at all. The C1 file has defined a particular ID as having a form that does not exist on the SURVLIB.FORM data set. The program is unable to determine which form to use. In this case, the screen will revert to the traditional iditem format of only displaying items that are in the item data sets.

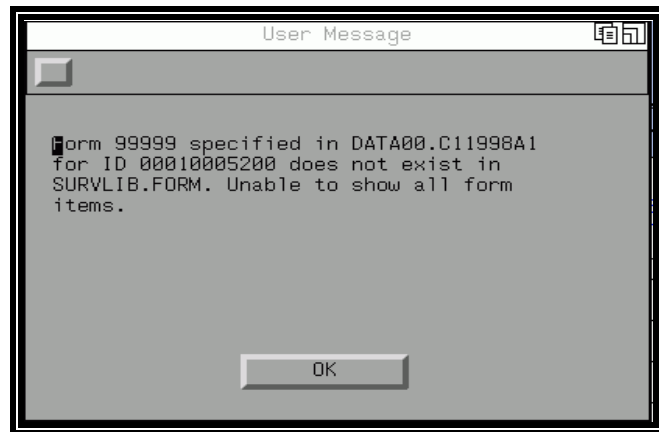


Figure 4.2.9d

To avoid problems, carefully create and verify the validity and consistency of your survey's form parameter files to include SURVLIB.FORM, PARMLIB.FORMITEM, PARMLIB.ITEMDICT, PARMLIB.SURVPARM, AND DATA00.C1YYYYPP..

Pmenus

Pmenu for ID by ITEM and ID by ITEM-CP screens

Pmenu	Options	Function
EDIT	Apply corrections (F2) Apply corrections + run survey defined processes* Undo Delete (F6) Add item Create record with all form items Delete current items with no data Run edit Splits Derive items Weight items Run simple imputation Run simple imputation and edit Adjust/weight for current stat period Adjust/weight for prior stat period Adjust/weight for both current & prior stat periods Derive/Adjust *Not available for ID by ITEM-CP	Apply corrections to database Apply corrections and run processes defined in survey setup Undo changes to ID Delete contents of a field/row Add an item record to the ID Displays all items from form, even if no data exists Do not display items that have no data Run the single ID edit Run splits for the ID (Must be a parent record.) Calculate derived items for ID Weight items for ID Run simple imputation for ID Run simple imputation, followed by edit (for ID) Adjust current stat period item data for ID Adjust prior stat period item data for ID Adjust both current and prior stat period data for ID Derive/adjust data for ID
UTILITIES	Next ID (F5) Previous ID (F4) Next page (PgDwn) Previous page (PgUp) First ID Last ID Print	Access next ID in selection set Access previous ID in selection set Access next screen of data for ID Access previous screen of data for ID Access first ID in selection set Access last ID in selection set Print ID by Item screen

Pmenu	Options	Function
GOTO	<p>Control Data ➤ Control Information Collection History Status Changes Mail Group Audit Trail ➤ Control Audit by ID Control Audit by</p> <p>Date</p> <p>Item Data ➤ ID by Item-CP* ID Matrix Item by ID Historical Data ➤ Single Item One or More Items Audit Trail ➤ Item Audit by ID Item Audit by Date Data Entry ➤ Basic Data Entry Advanced Data Entry</p> <p>Roster Data ➤ Roster Item Matrix Audit Trail ➤ Roster Audit by ID Roster Audit by</p> <p>Date</p> <p>Respondent Text</p> <p>Notes</p> <p>*On the ID by ITEM screen. The ID by ITEM-CP menu refers users to the ID by ITEM screen</p>	<p>Access the Control Information screen for this ID Access Collection History screen for this ID Access Status Changes screen for this ID Access the Mail Group screen Access Control Audit by ID screen for this ID Access Control Audit by Date screen</p> <p>Access ID by Item CP screen Access ID Matrix screen (for selected item) Access Item by ID screen for this ID Access Historical Data screen (for single item) Access Historical Data screen (for multiple items) Access Item Audit by ID screen for this ID Access Item Audit by Date screen Access the Basic Data Entry screen for this ID Access the Advanced Data Entry screen (if available)</p> <p>Access the Roster Item Matrix Screen Access Roster Audit by ID screen for this ID Access Roster Audit by Date screen</p> <p>Access Respondent Text screen for this ID</p> <p>Access Notes screen for this ID</p>
HELP	<p>ID by Item Help (F1) Color Scheme Help</p> <p>Function Key Help</p> <p>Whoaml (F7)</p>	<p>Display help information on using the ID by Item screen Display a legend explaining the various colors within the screen Display the various function keys within the Review and Correction module Display user default and systems information</p>
EXIT	<p>StEPS Main Menu (Home) Exit (F3)</p>	<p>Return to StEPS Main Menu Exit to previous screen</p>